

ADVISORY TEAM STARTER TOOLKIT

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Advisory Team

Sample Communications

Nominations Open- New Team

If you are starting a team for the first time there are two scenarios:

- A. If you have been at the organization for more than a year and you can already identify volunteers who have leadership qualities, ask them first. Use the selection spreadsheet to make sure you have a good mix of voices. You may not get all the voices you desire in the first year, but it is what you strive to work towards.
- B. If you are new and would like to implement the voices of the volunteers, ask staff to suggest volunteers to you that may be a good fit to help the team get started the first year.

Nominations Open – Recurring Team

Nominations are open for the (insert year) Volunteer Advisory Team. Respond to this email or reach out to us at (insert volunteer email address here) by (insert deadline date) indicating that you are interested in being on the team next year or nominate a fellow volunteer who would be a good fit.

The advisory team is composed of volunteers and exists to idea-share, offer feedback and provide creative solutions to help improve the volunteer program and the volunteer experience. Here are some of the accomplishments from the (insert previous year) Volunteer Advisory Team

(List all notable accomplishments: Some examples may be)

1. Submitted Ideas for Volunteer Appreciation Month
2. Chose items to update volunteer store
3. Test pilots for new volunteer resources
4. Conducted Volunteer Trainings
5. Local media representatives

Nominations Closing Soon

The suggestion is that this messaging goes out with one week left to the deadline.

Nominations are closing soon for the (insert year) Volunteer Advisory Team. Respond to this email or reach out to us at (insert volunteer email address here) by (insert deadline date) indicating that you are interested in being on the team next year or nominate a fellow volunteer who would be a good fit.

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1. Submitted Ideas for Volunteer Appreciation Month
2. Chose items to update store
3. Test Pilots for new volunteer resources



4. Conducted Volunteer Trainings

Nominee Email

Sample email to send out to all your nominees. Depending on how many it is, consider using email merge to send out multiple emails.

Dear (Volunteer First Name),

Congratulations! You have been nominated to be a member of the (insert year) advisory team. Please answer the following questions by (insert deadline here) (these can be made into a survey/questionnaire if you prefer):

1. Do you accept this nomination? If yes, please continue.
2. Are you able to attend one-hour monthly meetings?
3. In what ways do you volunteer with the organization (list all that apply)?
4. How long have you been a volunteer with our organization?
5. (if your organization is regional or national) – In which city/cities do you volunteer with the organization?
6. What do you love most about our volunteer program?
7. If you could improve 3 things about our program, what would it be?
8. How would you implement one of the suggestions listed above?
9. What unique skills/perspectives can you bring to the advisory team?
10. Is there anything else you would like me to know?

Potential Team Member Interview

Thank you so much for your time and answering the questions in the email. I wanted to make sure you had a full understanding of the role. Do you have any questions?

Once finished.....

Just a quick reminder that this will be a difficult decision and I am doing my best to make sure that all voices are represented so that the organization on a whole benefits from the make up of the team. I hope to notify everyone if they have made the team or not by (insert date).

New Team Members

This message can be delivered either via e-mail or personal phone/zoom call.

Congratulations! You have been selected to be a member of the (insert year) Advisory Team. Please respond by (insert deadline) to let me know if you accept. If you do accept, please keep this confidential. I haven't had a chance to notify those who have not been selected as yet, and I would like for them to hear the news from me. In the meantime, please select one of the times in this [doodle poll](#) that would work for you to attend our first meeting. At that meeting, we will set the recurring date and/or select the date of the next meeting as a group.

Note: I often will invite all newly selected members to the first meeting and they all meet each other for the first time at the same time. It is a way to create excitement for the team.

Team Members Not Selected

It is suggested that this news is delivered via phone call. If preferred to notify by email:

Thank you for being interested in being a part of the (insert year) volunteer advisory team. It was an extremely difficult decision. I regret to inform you that you were not selected for this year's team. Please know that this is



not personal and I made the selections based upon what would be best for the organization. If you are interested, please try again next year. If you would like, I am happy to jump on a call to discuss with you if you would like, just let me know.



[illegible]

Volunteer Advisory Team Operating Agreement

Purpose of the Volunteer Advisory Team

The purpose of the advisory team is to provide valuable insights and recommendations from the volunteer perspective to help the **(insert title here)** make decisions to create a positive experience for the **(name of the organization)**.

Purpose of the Volunteer Advisory Team Agreement

This agreement serves as the guidelines and ground rules to help the team work most productively together over the course of the **(insert time period – 1 year suggested)**. The agreement is a living document and may be updated as the need arises throughout the current year. Any updates will be discussed with and ratified by the Volunteer Advisory Team members.

Advisory Team Term of Service

- Team members for the **(insert current year)** year are active from **(x/xx/xxxx– x/xx/xxxx)**.
- One month prior to the end of the term, the option for new members to become a part of the team for the next year will be made to the volunteer team on a whole. At that time the **(insert title here)** will make selections for the following year.
- There will always be a maximum of **(XX)** members on the team and a current team member's position is not guaranteed each year.
- A team member can be dismissed from the team if the **(insert title)**, in their sole discretion, determines that:
 - The member does not offer constructive criticism
 - The member is in constant conflict with the other team members
 - The member is sharing confidential information
 - The member has missed three meetings during the season
 - The member fails to be present at a shift they have signed up for without cause or reason ("No Show")

Meetings

- Team meetings shall be held **(insert recurring schedule)** or **(using the following language)**, and the next month's meeting will be scheduled at each meeting. During each meeting, a "parking lot" will be used to record topics that require discussion at a later date.
- Project leaders will report status of their project **(insert cadence)** to the **(insert title here)**.
- Issues, risks, change requests, and action items will be reviewed and updated at each meeting
- The **(insert title here)** will be responsible for facilitating and keeping meetings on track. Team members will accept the **(insert title)'s** decision to table or "park" a discussion topic.
- Meetings will start and end on time. Team members will attend meetings **(indicate whether in person or virtually)**. A dial-in number or zoom link will be available for remote attendance.
- It is the responsibility of each team member to stay current on the team activities, even when missing a meeting.



Team Communications

- Meeting agendas will be e-mailed to team members at least 24 hours prior to meetings. Meeting minutes will be e-mailed to all team members within 48 hours after meetings.
- Team members will exercise discretion when discussing subject matter and information learned through their participation in this team. Team members will be advised of specific information that cannot be shared with the volunteer team as a whole.
- “Sidebar” conversations between team members during team meetings are frowned upon.
- **All communication will be open and courteous. No “overtalking” or interrupting.**
- It is the **(insert title)**’s responsibility to keep the team informed.
- It is the team member’s responsibility to notify the **(insert title)** if they are unable to attend a meeting.

Decision Making

- When making a decision, a simple majority of “thumbs up” votes will rule. It doesn’t mean everyone has to agree 100%
- There must be quorum in order to hold a vote
- The team will use thumbs up/thumbs down voting to make decisions quickly and move on
 - Thumbs up = agree with no further discussion.
 - Thumbs sideways = agree, but have further questions. (Questions will be asked and answered immediately after the vote.)
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- Members may not abstain from voting. Everyone’s opinion counts and they must exercise their right to vote.
- Meeting minutes will document the decisions made

Personal Courtesies

- Each team member represents a specific area of expertise or volunteer type. Team members will bring their individual perspectives to the team and will also consider what is best for the Volunteer Team.
- All cell phones and other communication devices must be silenced during meetings and used on an exception basis only.

Reviewed and approved by:

Volunteer Advisory Team Member Name

Date:

(insert your title here)

Date:



Suggested Tasks for Advisory Team:

- Town Hall Topics / Organization
- Refresh Trainings for New Volunteers
- Conduct Trainings for New Volunteers
- Help Train New Volunteers
- Select the Annual Volunteer Appreciation Gift
- Assist with New Volunteer Orientations
- Lead Monthly Birthday Recognition
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- Theme of Annul Volunteer Event
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- Creation / Implementation of New Systems Documents to Make Volunteering Easier



Tasks for MY Advisory Team:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Sample Advisory Team Agenda

Insert Org Logo Here

(Enter Year) (Enter Month) Advisory Team Agenda

1. Welcome
2. Introductions
3. New Team Picture
4. Set Recurring Monthly Meeting Date or Select Next Meeting Date
- 5.

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